The Fifth Estate

RADIO TELEVISION CABLE SATELLITE

Broadcasting Nov 13

KATZ COMMUNICATIONS INC

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NBC sews up NBA for record $600 million

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Broadcasting Nov 13

Vol. 117 No. 20

NBC nets NBA deal...

National Basketball Association signs four-year, $600 million agreement with NBC that will more than triple NBA' s annual broadcast network TV revenue. **PAGE 35.**

Making of must carry...

BROADCASTING's must-carry chronology looks at history of rules. **PAGE 36.**

Bankers' hour...

This special report on Fifth Estate financing examines how investment banks may affect future media landscapes by way they , respond to their own changing situation; provides look at some of major Wall Street firms with media practices, and capital and M&A services offered by those firms outside of major investment bank media groups. **PAGE 47.**

38/ **MCA CONTENDERS**

MCA TV is offering five new shows in syndication, including packaged strip for stations.

Adam 12 (above), part of

40/ **HYBRID SERVICE**

Commercial KRON-TV San Francisco and noncommercial KQED(TV) there join to produce 24-hour all-news broadcast/cable channel.

41/ **WORDS FROM VALENTI**

Motion Picture Association of America President Jack Valenti lashes out at U.S. networks and European Community for adopting programing quotas..

42/ **L.A.-DENVER BUY**

Viacom Broadcasting signs agreement to purchase KJOI(FM) Los Angeles and KHOW(AM)-KSYY(FM) Denver from Command Communications for $101.5 million cash.

82/ **SOUP'S OFF**

ABC cancels *Chicken Soup* due to show's inability to hold onto lead-in audience; network says Oprah Winfrey will star in and co-produce half-hour drama series for next spring.

82/ **'WAKE, RATTLE & ROLL'**

Worldvision syndicates Hanna-Barbera's live-action/animated first-run strip for 1990-91 season.

84/ **MTM CHANGES**

R. Kevin Tannehill is named president of MTM Television Distribution, capping management reorganization by MTM owner.

86/ **MOVEMENT TOWARD TV MARTI**

House-Senate conference agrees on authorization bill providing for TV Marti Service and offering protection to U.S. broadcasters from interference.

88/ **HBO INCENTIVES**

HBO institutes new subscriber incentive program: "Son of SIP."

88/ **THUMBS DOWN**

National Commission on Working Women's annual report on new TV season finds characterization of females unrealistic, with, according to luncheon host, actress Linda Lavin, return to "old stereotypes and unbelievable characters."

93/ **TV ADVERTISING**

Advertiser-supported TV encounters resistance from Europeans, say speakers at London barter syndication conference.

94/ **EUROPEAN BARTER**

Roundtable of experts explore barter syndication's potential growth in Europe.

97/ **DOMINANT AM'S**

Often overlooked in discussions to improve AM band is fact that many major market AM's are doing just fine.

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Henry Guzewicz, chairman of Stainless Inc., has made his mark on Fifth Estate by filling some tall orders.

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BY THE NUMBERS 1

ABC's *Coach*, shown at right, returns to the network's schedule Tuesday, Nov. 21, to take over the time slot, at least temporarily, last occupied by *Chicken Soup*, which bowed out during Week Eight with its final 15.2 rating/24 share. The network's *thirtysomething* had its lowest rating so far this season that same night, posting an 11.8/20.5, down from Week Seven's 12.2/22.

Coach has had 24 exposures to date in a mixture of Tuesdays and Wednesdays at 9 or 9:30. Most recently, *Coach* ran on Wednesdays at 9:30, during last season's Week 48 through Week 51, when it averaged a 7.7/13. Prior to that, the show ran on Tuesdays in the same slot for seven weeks, where the show had its best track record, averaging a 12.9/23. Twelve broadcasts on Wednesday nights, from Week 24 through 38 of last season, gave the show a 10.7/17 average.

Tonight, CBS's *Doctor, Doctor* returns to the 10:30 Monday slot it last occupied during Weeks

"By the Numbers" continues on page 14

RATINGS ROUNDUP

Week 7 □ Oct. 30–Nov. 5

Rank/rating	Network	Show
1 ▲ 25.4/39	N	*Cosby Show*
2 ▲ 24.7/38	N	*Different World*
3 24.4/37	N	*Cheers*
4 ▼ 23.8/37	A	*Roseanne*
5 ▲ 21.3/36	N	*Golden Girls*
6 21.2/33	N	*Dear John*
7 ▼ 21.1/33	C	*60 Minutes*
8 ▼ 20.2/30	C	*Murder, She Wrote*
9 ▲ 20.1/34	N	*Empty Nest*
9 ■ 20.1/34	N	*L.A. Law*
11 ▲ 19.9/34	A	*NFL Monday Night Football*
12 19.0/33	A	*Barbara Walters Special*
13 ▲ 18.0/30	N	*Unsolved Mysteries*
14 ▼ 18.9/30	N	*In the Heat of the Night*
15 17.6/27	A	*ABC Sunday Movie*
16 ▲ 17.6/28	A	*Growing Pains*
17 ▼ 17.4/27	A	*Wonder Years*
18 ▲ 17.3/28	N	*Matlock*
19 ▼ 16.8/26	N	*NBC Monday Movie*
20 ▼ 16.8/27	A	*Who's the Boss?*
21 ▲ 16.7/26	A	*Head of the Class*
22 ▼ 16.3/25	C	*CBS Sunday Movie*
23 ▼ 15.9/26	A	*Chicken Soup*
24 15.7/26	A	*Full House*
25 ▼ 15.7/29	N	*Hunter*
26 ▲ 15.1/28	N	*Midnight Caller*
27 ▼ 15.1/23	N	*Night Court*
28 ▼ 15.0/23	A	*Doogie Howser, M.D.*
29 ▼ 14.6/25	C	*Knots Landing*
30 ▲ 14.1/22	N	*ALF*
31 ▼ 14.1/22	C	*Jake and the Fatman*
32 ▲ 14.0/24	N	*Amen*
32 ▲ 14.0/22	C	*Designing Women*
32 14.0/26	A	*20/20*
35 13.9/21	N	*Wickedest Witch, special*
36 ▼ 13.8/20	C	*Murphy Brown*
37 13.7/24	A	*Family Matters*
38 ▼ 13.2/21	A	*Anything But Love*
39 ▲ 12.8/21	A	*MacGyver*
40 12.7/22	C	*Dallas*
40 12.7/22	A	*Perfect Strangers*
42 ▲ 12.5/20	S	*NBC Sunday Movie*
43 ▲ 12.3/19	C	*48 Hours*
44 12.2/19	C	*Garfield's Halloween, special*
44 ▼ 12.2/22	A	*thirtysomething*
46 ▲ 12.0/21	C	*Newhart*
47 ▼ 11.9/18	C	*Famous Teddy Z*
47 11.9/21	A	*Just the Ten of Us*
47 ▼ 11.9/17	N	*My Two Dads*
50 ▼ 11.8/17	F	*Married...With Children*
51 ▼ 11.7/21	N	*227*
52 ■ 11.6/18	N	*My Two Dads, Wednesday*
53 ▼ 11.3/18	C	*Rescue: 911*
54 ▼ 11.1/20	N	*Baywatch*
55 ▲ 10.8/19	C	*Paradise*
56 ▲ 10.5/16	F	*America's Most Wanted*
57 ▼ 10.3/18	C	*Wiseguy*
57 ▼ 10.3/16	A	*Young Riders*
59 10.2/19	C	*Falcon Crest*
59 ▲ 10.1/19	N	*Manhunt, FBI*
61	9.9/15	C *Famous Teddy Z, special*
61 ▲	9.9/17	N *Hardball*
61	9.9/16	A *Life Goes On*
64 ▼	9.7/15	N *Magical World of Disney*
64 ▲	9.7/15	C *Top of the Hill*
64 ▼	9.7/14	F *Totally Hidden Video*
67 ▲	9.4/14	A *Free Spirit*
67 ▼	9.4/16	N *Quantum Leap*
69 ■	9.3/16	A *ABC Mystery Movie*
70 ▼	9.2/14	N *Sister Kate*
71 ▼	8.6/13	A *Mission: Impossible*
72 ▼	8.3/15	C *Island Son*
73	8.0/13	C *Hagar the Horrible, special*
73 ▼	8.0/14	A *PrimeTime Live*
75 ▼	7.8/14	C *Sat. Night with Connie Chung*
76	7.7/12	C *Blondie and Dagwood, special*
76 ▼	7.7/13	C *Tour of Duty*
78	7.5/11	A *Homeroom*
79	7.4/13	A *Living Dolls*
80 ▼	7.1/13	F *Cops*
81	6.9/12	C *Peaceable Kingdom, breakout*
82	6.7/12	A *Mr. Belvedere*
83 ▼	6.4/10	F *Booker*
83 ▼	6.4/9	F *Open House*
85 ▼	6.0/9	F *21 Jump Street*
86 ▼	5.7/8	F *Alien Nation*
87 ▼	5.5/9	C *Wolf*
88 ▼	5.1/9	F *Reporters*
89 ▼	4.0/6	F *Tracey Ullman Show*
90 ▼	3.0/5	F *Beyond Tomorrow*
91 ▼	2.6/5	F *Gerry Shandling's Show*

Source: Nielsen Media Research

FREEZE FRAMES: Syndication Scorecard *

Week ended Oct. 29

Rank	Program	Syndicator	Rtg	Stns	Cov%
1			13.6	226	97
2			11.9	215	97
3			9.6	231	97
4			9.5	204	98
5			9.3	212	99
6			8.5	184	95
7			8.2	164	95
8			7.4	193	91
9			6.1	221	98
10			5.8	128	90
11			5.6	195	98
12			5.5	133	88
13			5.4	125	85
13	Star Search (TPE)		5.4	155	94
15	Married...With Children	Warner Bros. Domestic TV	5.1	165	89

The following shows were rated, but not ranked

	Wrestling Network	Turner Program Services	6.5	165	91
			8.4	242	96

* Nielsen weekly pocketpiece

Source: Nielsen and Broadcasting's own research

Summary of Broadcasting & Cable

BROADCASTING			
SERVICE	ON AIR	CP's [1]	TOTAL *
Commercial AM	4,966	255	5,220
Commercial FM	4,234	774	5,008
Educational FM	1,461	265	1,656
* Total Radio	10,600	1,284	11,884
Commercial VHF TV	547	21	568
Commercial UHF TV	536	202	740
Educational VHF TV	122	6	128
Educational UHF TV	220	25	245
* Total TV	1,434	257	1,691
VHF LPTV	309	205	505
UHF LPTV	324	1,508	1,832
* Total LPTV	634	1,713	2,337
FM translators	1,778	320	2,098
VHF translators	2,717	115	2,832
UHF translators	2,167	439	2,606

CABLE†	
Total subscribers	50,597,000
Homes passed	73,900,000
Total systems	9,500
Household penetration†	68.4%
Pay cable penetration	35.4%

* Includes off-air licenses. † Penetration percentages are of TV household universe of 90.4 million. [1] Construction permit. [2] Instructional TV fixed service. [3] Studio-transmitter link. Source: Nielsen and Broadcasting's own research.

"By the Numbers" continued from page 10

39 through 45 of the 1988-89 season. For the show's six exposures, it averaged a 10.6/20, from a premiere high of 12.1/23 to a mid-flight low of 9.4/17, and back up to a Week 45 closeout of 11.0/21.

Week Seven went to NBC when the network posted a 15.2/24.8. ABC came in second with a 13.7/22.4, followed by CBS's 11.9/19.4. Together, the big three posted a 40.8/66.6 and delivered 37.6 million households. That figure is up slightly from last year's 40.0/65.2. This season's larger TV household universe means an additional 1.4 million households were delivered over last year's 36.2 million.

In the book of days for Week Eight, NBC has taken Wednesday away from ABC for the third time this season, winning the night with a 14.0/23 over ABC's 13.3/22. As reported last week, the book of days for Week Seven marked NBC's first Tuesday night win this season, accomplished with a 17.1/28.7 over ABC's 16.4/27.1.

The other nightly wins for Week Seven were: ABC won Monday, Wednesday and Friday; NBC took Thursday and Saturday, leaving CBS with Sunday.

MarketScope

It was another down week for the S&P Industrials and for the Stock Index as well. For the week ended Wednesday, Nov. 8, the S&P was down 4.28 from the previous week's close of 389.42. For the 127 stocks currently tracked on the Stock Index, there were 45 advances, 62 declines and 20 unchanged. The Cable group had another bad week, with only one stock advancing, TCA Cable TV, two remaining unchanged and the other 16 stocks posting a decline. The Programming group posted 14 advances, seven declines and six unchanged. The largest gain posted was for CapCities, up 8¾, to 547. Multimedia lost the most, 4 points, to close at 91. In the Service group, Grey Advertising gained 5 to close at 166.

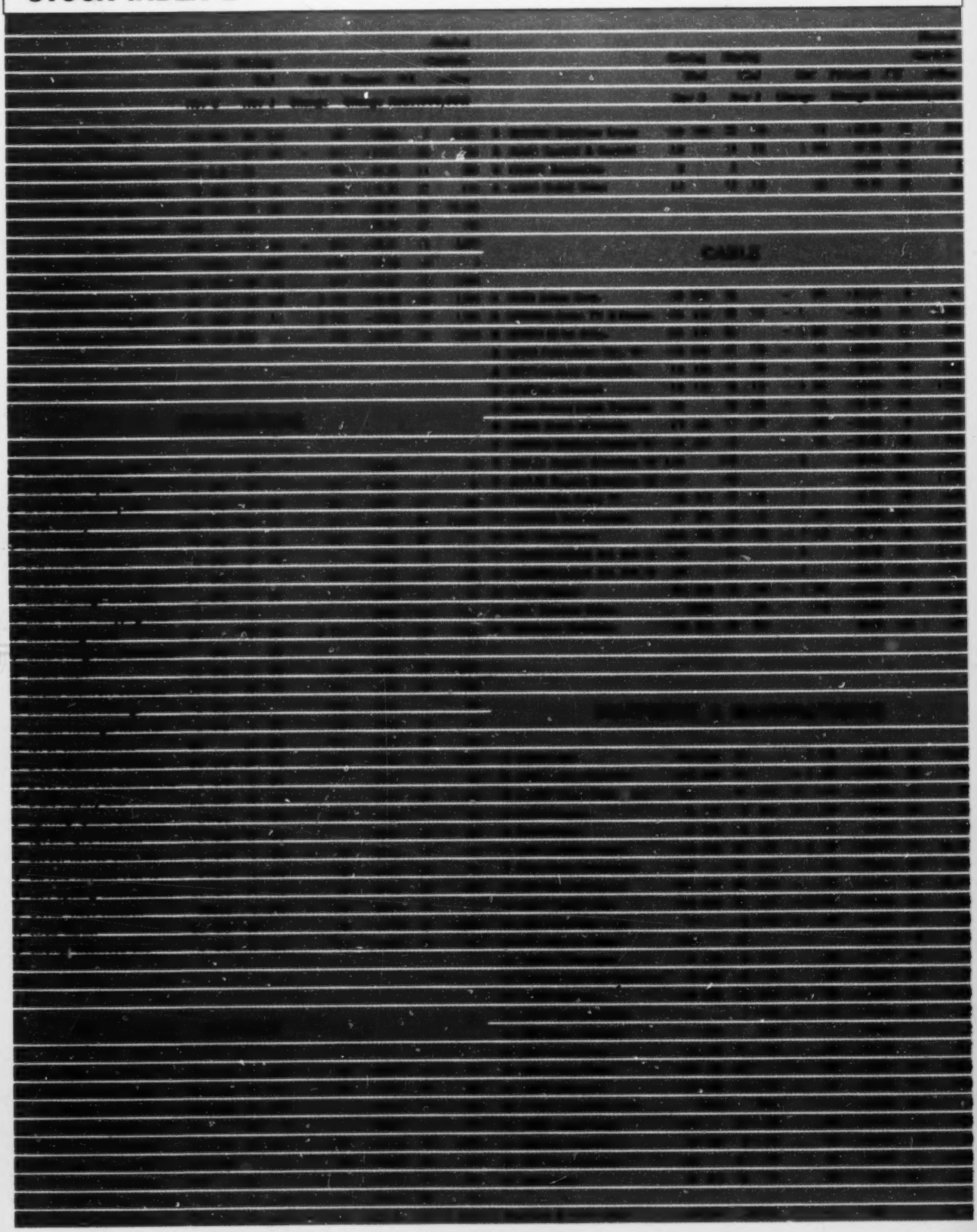
Stock Index Notes: T-Toronto, A-American, N-NYSE, O-NASDAQ. Bid prices and common A stock used unless otherwise noted. P/E ratios are based on earnings per share for the previous 12 months as published by Standard & Poor's or as obtained by Broadcasting's own research.

STOCK INDEX 1

	Closing Wed Nov 8	Closing Wed Nov 1	Net Change	Percent Change	P/E Ratio	Market Capitalization ($000,000)
BROADCASTING						
BROADCASTING WITH OTHER MAJOR INTERESTS						

BY THE NUMBERS 3

STOCK INDEX 2



ing SBCA convention. Bally's Grand hotel, Las Vegas. Information: Harvey Bolgla, (212) 807-1400.

Jan. 22-24—*Satellite Broadcasting and Communications Association* satellite television industry trade show. Bally's, Las Vegas. Information: (800) 654-9276.

Jan. 23-25—*Georgia Association of Broadcasters* Georgia Radio-TV Institute. University of Georgia, Athens. Information: (404) 993-2200.

Jan. 26-27—*Society of Motion Picture and Television Engineers* 24th annual television conference. Contemporary hotel, Orlando, Fla. Information: (914) 761-1100.

■ **Jan. 26-27**—*Minnesota Association of Cable Television Administrators* seventh annual conference, "Entering a New Decade of Cable Challenges." Scanticon Conference Center and Hotel, Plymouth, Minn. Information: Linda Magee, (612) 788-9221.

Jan. 27-31—*National Religious Broadcasters* 47th annual convention. Sheraton Washington and Omni Shoreham hotels, Washington.

Jan. 30-Feb.1—*South Carolina Broadcasters Association* 42nd annual convention. Embassy Suites hotel, Columbia, S.C.

February, 1990

Feb. 1—HDTV conference, examining political and technological questions surrounding introduction of HDTV to U.S. market, sponsored by *International Communications Industries Association*. Information: (703) 273-7200.

■ **Feb. 1**—Deadline for entries for *Action for Children's Television*'s 1989-90 Achievement in Children's Television Awards. Information: Sue Edelman, (617) 876-6620.

Feb. 6-7—*Arizona Cable Television Association* annual meeting. Hyatt Regency, Phoenix.

Feb. 8-10—*Louisiana Association of Broadcasters* annual convention. Lafayette Hilton, Lafayette, La. Information: (504) 383-7486.

Feb. 9—*International Radio and Television Society* newsmaker luncheon. Waldorf-Astoria, New York. Information: (212) 867-6650.

Feb. 11-16—12th International Film, Television and Video Market. Loews hotel, Monte Carlo, Monaco.

Feb. 13—*Federal Communications Bar Association* luncheon. Speaker: FCC Commissioner Sherrie Marshall. Washington Marriott, Washington.

Feb. 13-14—Television Advertising Workshop, sponsored by *Association of National Advertisers*. New York Hilton, New York. Information: (202) 785-1525.

Feb. 13-14—*Broadcast Credit Association* 23rd credit and collection seminar. Westin Lenox hotel, Atlanta. Information: Mark Maltz, (312) 827-9330.

Feb. 21-23—Texas Cable Show, sponsored by *Texas Cable TV Association*. San Antonio Convention Center, San Antonio. Information: (512) 474-2082.

Feb. 28-March 2—*Cable Television Public Affairs Association* Forum '90, "annual skills and strategies seminar that provides cable system operators and cable network programers the opportunity to sharpen their public relations skills." Portman hotel, San Francisco. Information: (703) 276-0881.

Open Mike

Clean-up campaigner

EDITOR: I applaud Mr. Peter M. Bardach and his comments in his "Open Mike" letter of Oct. 23. Radio broadcasters better clean up their act. They always claim First Amendment rights, but they fail to realize that with every right comes responsibility. Take no responsibility and you lose that right. Just look what is happening. The FCC is cracking down because of irresponsibility. Take no responsibility and you lose that right. Just look at what is happening. The FCC is cracking down because irresponsible broadcasters are running amuck and those same irresponsible broadcasters do not know anything about history either. I join Mr. Bardach in imploring all broadcasters to tend to their housekeeping.—*Peter Maynard, Milford, Pa.*

Early bird

EDITOR: Not to take anything away from the efforts of KNSD(TV) San Diego in landing their interview with the Vice President ("Fates and Fortunes," Oct. 23), but I must point out this was not the first interview granted to a local television station.

On Feb. 25, 1989, the Vice President was interviewed by KSTP-TV anchor Randall Carlisle on board Air Force Two while en route to a speaking engagement in Minneapolis.

The interview covered topics of interest to the Midwest as well as Mr. Quayle's impressions after his first few weeks in office.—*Rick Willis, executive producer for news, KSTP-TV Minneapolis.*

Thank you note

EDITOR: I was about halfway between San Francisco and Santa Cruz when the Loma Prieta earthquake hit. For an hour after tremors ended, I stood in a parking lot with co-workers listening to reports on a car radio. We switched among the stations, gradually forming a picture of what had happened in the Bay Area as callers described their experiences and news reports began to filter in. The radio kept me company during my hour drive home in bumper-to-bumper traffic, and it kept me informed for three-and-a-half hours as I waited for the electricity in my apartment to be restored.

When the electricity came on, I turned on the television and saw my first pictures of the devastation. The anchors and reporters juggled updates and interviews, keeping the pace moving when technical difficulties cut live footage short, looking tired but sounding coherent, continuing to inform viewers who were able to receive their reports.

As a former reporter, I can appreciate how hard the radio and television newscasters worked in the aftermath of the earthquake. As a Bay Area resident, I appreciated the coverage even more.—*Jeannie Omohundro, Sunnyvale, Calif.*

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see ourselves trying to raid different companies to generate transactions."

At Manufacturers Hanover, a unit of the bank's holding company, for example, is an equity investor in a venture with Apollo Radio Ltd., a radio operator. That setup "is certainly an indication of where we'd like to see things moving in the future," Jomo said.

Expansion beyond senior lending is taking place at smaller banks, too. Earlier this year, Society National Bank and broker RC Crisler & Co. formed a joint venture that provides financial advisory services as well as private placement of debt, equity and mezzanine financing, said Charles P. Coon, Society's vice president and manager of the communications division.

One of the barriers left to break for banks operating in the U.S. is the limitation on underwriting public securities defined by the Glass-Steagall Act. Although specific authorization has been obtained by some banks to derive a small portion of their total revenue from debt underwriting in a company separate from the bank itself, banks hope for, and expect, still more liberalization of the Glass-Steagall Act constraints. "I see it happening.... I don't think it's going to take a terribly long time," McDonald said. "We think we're well positioned to take advantage of any new change in the rules."

"Do I think the limitations placed against banks are somewhat outdated?" asked Lang. "I do. Particularly as those of us in banks...are using their own money for investment, not simply acting in an agency role." **–GF, GM**

A Sampler of Fifth Estate Lenders

Bank	*TV/Radio*	*Cable*	*Entertainment*	*Total*
Bank of Boston	$606 million	$1.04 billion	$956 million	$2,602,000,000
Bank of California	$99.3 million	$385 million	—	$484,300,000†
Bank of New England	$745 million	$730 million	—	$1,475,000,000
Bank of New York	$662 million	$1.624 billion	$696 million	$2,982,000,000
Bank of Nova Scotia	$162.3 million	$1.1287 billion	$471.2 million	$1,762,200,000
Chase Manhattan Bank	$300 million	$1.15 billion	$265 million	$1,715,000,000
Chemical Bank	$660 million	$910 million	—	$1,570,000,000*†
Citibank	$1.6 billion	—	—	$1,6,000,000**†
1st National of Chicago	$1.2 billion	$1.775 billion	$310 million	$3,285,000,000
Manufacturers Hanover	$445 million	$900 million	$600 million	$1,945,000,000
Mellon Bank	$450 million	$1.320 billion	—	$1,770,000,000*
NCNB, N.C.	$110 million	$930 million	$195 million	$1,235,000,000
NCNB, Texas	$245 million	$1.159 billion	—	$1,404,000,000*
National Westminster	$296 million	$889 million	—	$1,185,000,000
Philadelphia National Bank	$150 million	$1.2 billion	$200 million	$1,550,000,000
Security Pacific	$400 million	$250 million	$800 million	$1,450,000,000

Notes: Numbers are derived from funded and/or unfunded commitments. * Estimate. ** Includes cable.

† Indicates company that may do entertainment lending but did not provide BROADCASTING with figures.

Names and numbers. Figures above show loan amounts currently outstanding from funded and/or unfunded commitments. Unfunded means the money is set aside for a specific company. The "TV/Radio" category was not broken down because many banks lend to group owners who own both. "Entertainment" includes movie and TV studios and production companies but not movie theater owners. Loan commitments are to U.S. companies only.

The following banks also provide broadcast and cable lending: American Security, AmeriTrust Co., AmSouth Bank, Bank of America, Bank of Hawaii, Bank of Montreal, Bank of Oklahoma, Bank One Cleveland, Bank One Dayton, Bank One Indianapolis, Bankers Trust Co., Banque Paribas, BayBank of Boston, Casco Northern Bank, Central Bank of Denver, Central Trust Co., Citizens Bank, Citizens Fidelity, Colorado National Bank, Connecticut National, Continental Ill., Crestar Bank, Deposit Guaranty, Equitable Bank, Fidelity Bank, Fifth Third Bank, First American National, First Interstate, First American National, First City, Houston, First Florida Bank, First National, Md., First Pennsylvania, First Union National, First Wisconsin, Fleet National Bank, Frost National Bank, Hibernia National Bank, Irving Trust Co., Kansas City Commerce, Marine Midland Bank, Merchants National, Michigan National Bank, Morgan Guaranty Trust, National Bank of Detroit, National City Bank, Norwest Bank, Minn., Old Stone Bank, Pittsburgh National, Provident National Bank, Signet Bank, Society National Bank, South Carolina National, Sovran Bank, Sovran Bank of Maryland, State Street Bank, Sun Bank of Miami, Sun Bank of Orlando, SunTrust Banks Inc., Toronto-Dominion, Trust Mark National, United Bank of Denver, United Carolina, United Missouri, U.S. Bank of Oregon, Wells Fargo Bank, Westpac Banking.